

SNPLMA Management And Reporting Tool



USER GUIDE

SNPLMA MANAGEMENT AND REPORTING TOOL (SMART)

SNPLMA's Web-Based Quarterly Reporting Database Version 7

March 2018

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ACCESSING THE "SMART" APPLICATION

You will be provided a Logon ID and set up to get access to External BASS, the BLM secure website that hosts SMART, using Internet Explorer (versions higher than 8 are recommended). SMART and BASS are two different things try not to confuse the two.

The URL to SMART through External BASS is: https://www.bass.blm.gov/bass2/login.do?dispatch=preparePage

After you are set you up as a user in BASS and SMART, the BASS system will send you an email with a temporary password. The sender will appear as **BASSAdmin@blm.gov**. You will need to use this "temporary" password within 48 hours or it will expire and you will have to contact the SMART Database Administrator (DBA), Deb at dackerman@blm.gov, to reset the password which will signal BASS to generate a new temporary password.

> Enter the above noted URL in Internet Explorer and log on, using your logon ID and the temporary password.



IMPORTANT NOTES

- 1. If you are logging in from an "internal " BLM network make sure that when you enter the URL you see the words "External Production" on the screen.
- 2. Consider carefully when switching to using your Smart Card and pin for access. Once you switch, that will be the only way to access External BASS and ultimately SMART. Our recommendation is that you DO NOT change to this type of access.

Create a new, unique password.

When creating your password, note the Password Rules. **Passwords will have to be changed every 60 days.** You will not be allowed to take advantage of any of the last 24 passwords you may have previously used. This requirement to change your password every 60 days is one that comes from the NOC (National Operations Center) it is not something we can change.



The system will notify you when your password is about to expire. You will get this notice daily starting five days prior to the expiration of your password. Here is a sample of the email that you would receive:

From: BASSAdmin@blm.gov [mailto:BASSAdmin@blm.gov]

Sent: Thursday, June 04, 2015 11:00 PM

To: Joan Smith

Subject: BASS: Password Expiration Notification

Dear BASS User (jsmith):

IMPORTANT NOTES

1. If it does expire, **DO NOT**, put in a Help Desk ticket, you need only contact the SMART Database Administrator (DBA), Deb at dackerman@blm.gov, to have your password reset.

Our system indicates that your BASS password expires IN 5 DAYS. In order to avoid your password expiring, which then requires submitting a Help Desk ticket to have it reset, please log into BASS (www.bass.blm.gov/bass2/) and reset your password.

Please do not reply to this email, as we are unable to respond to messages sent to this address.

You can change your password at any time you don't have to wait for a notice to do so.

Resetting your password.

Go to the SMART application and login, before your password has expired, and choose My Profile.



After logging on, you will see a screen like the one below.



You will now click on the drop-down arrow and choose "Change Password"





Enter your new password two (2) times making sure to follow the "Password Rules".

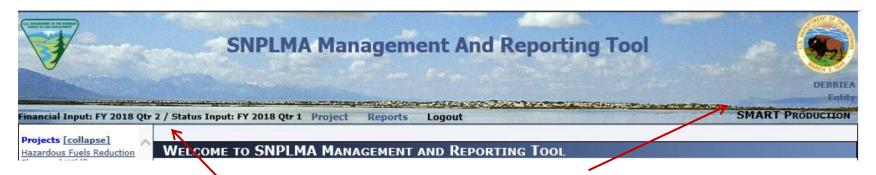


You will get a confirmation of the change and then click on "Continue" where you will then select the SMART Application.



> Click on "SMART Production" to enter the application.

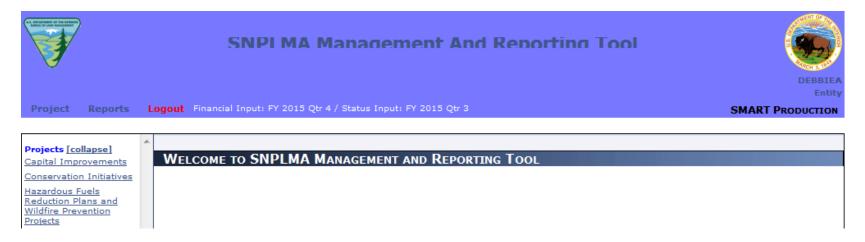
The first screen you will see is a Welcome Screen, which should display as shown below:



This screen has some information that can be very helpful. It shows you your User ID, Role, and what application you are in, and you can look up here to see the current period you are reporting on. In this example, you are entering your financial information for FY2018 Q2 and entering your status updates for work accomplished in FY2018 Q1. This display is at the top for every screen so you will always know what is being required of you.

BROWSER SETTINGS

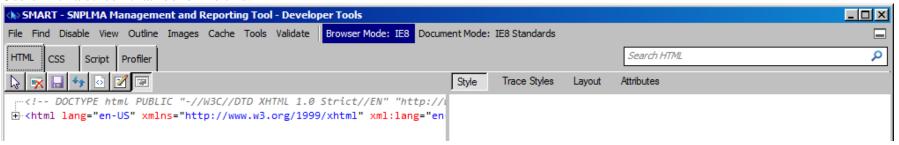
If your bowser is a version of Internet Explorer that is displaying the top of your screen as a solid color, as shown below, you will need to change the browser settings so that SMART will display appropriately.



Press the F12 key.

IE8 or Internet Explorer 8

Users with a screen that looks like this.



Click on Browser Mode then check "Internet Explorer 8" to display the welcome screen properly.



IE9 or Internet Explorer 9

Users with get a display along the bottom of their screen that looks like this.



Browser Mode will read "Browser Mode: IE9 Compat View". To view the application screens correctly and ensure functionality, you must change the Browser Mode to straight "Internet Explorer 8 or 9".

> Click on Browser Mode then check "Internet Explorer 8" to display the welcome screen properly.



> Click on Browser Mode then check "Internet Explorer 9" to display the welcome screen properly



IE11 or Internet Explorer 11

- IE 11 presents yet another challenge when it comes to the display. One way to help minimize this is to make sure to set your browser to "Enterprise Mode"
- > Click on Tools from the menu at the upper left side of your screen and make sure that you have a check mark by "Enterprise Mode"



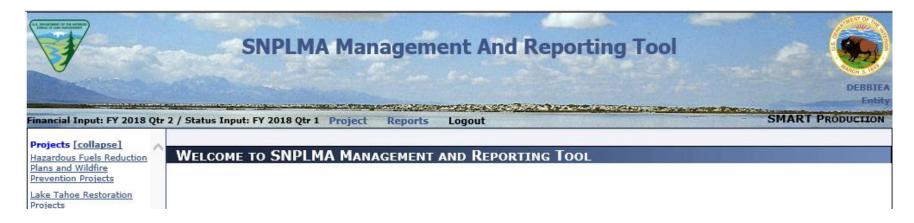
Checking for Enterprise Mode may be needed after a screen changes. You can easily see if you are in Enterprise Mode by looking for the 2 buildings visible on the address bar area.



Please Note: The SMART application will "time-out" after 15 minutes of inactivity. This will require you to login again. This is a BASS security requirement by the National Operations Center(NOC) in Denver and is not something that SNPLMA can change.

NOTE: Internet Explorer has many versions available and we cannot control who is running what. Anything above IE9 "works" but the display of fields may not always line up/look pleasing. "Firefox" cannot be used to view or use SMART.

LOCATING PROJECTS



There are two ways to access projects.

Method 1 (Preferred) Project Search: Use the "Project" selection in the top menu bar to search using selected parameters.

➤ Click on the desired Category. This will expand the category to show active projects within the category (those not yet closed or terminated). The screen shot below shows the active Forest Service projects in the Capital Improvements category. Categories with many active projects may require use of the scroll bar to see all projects.



Method 2 Dropdown List Search: Select the desired project from the category dropdown list on the left side of the Welcome Screen.



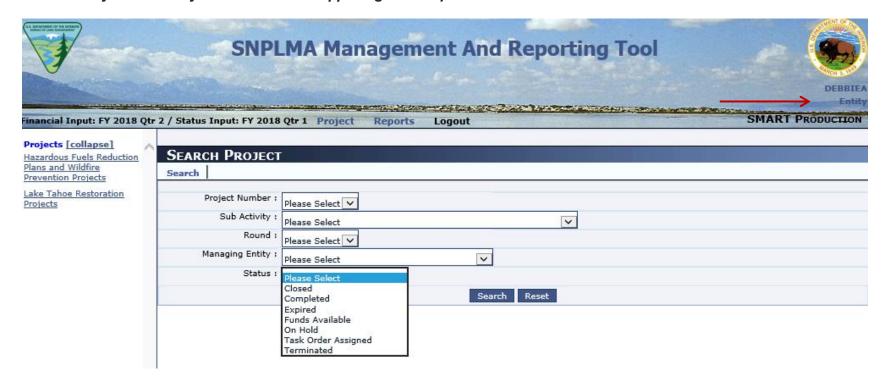
> Click on "Project" in the top menu.



(Note: Selecting parameters here will help to narrow the search to what you are looking for. However, if you wish to see all of the active projects you can hit the Search Button without any selections and get everything.)

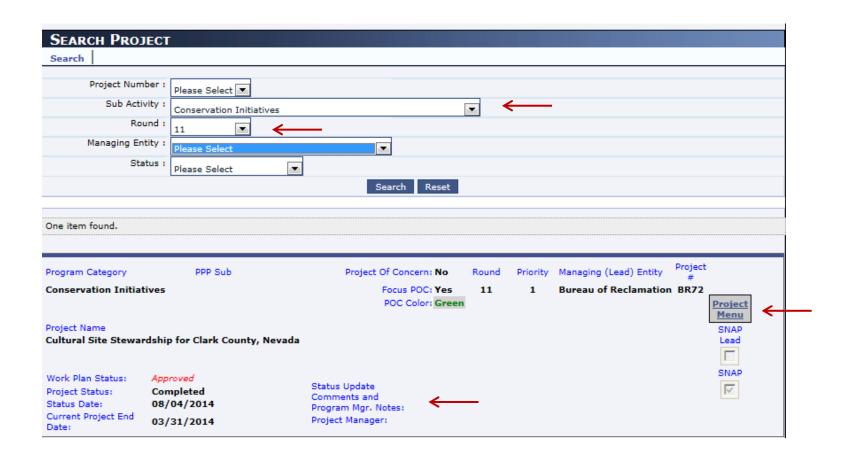
➤ Select desired parameters – There are ways to narrow your search and get a smaller list to look at. For example, if you want to look at completed (CM) projects vs. (TO) (Active/Task Order Assigned projects") you would choose "Completed" from the drop-down list to get a list of all the projects with CM status. (Note: Selection choices included on the drop-down list of status' are all of the choices that are available. However, the Entity User role will not be able to select and view Closed(CL) or Terminated(TR) projects.)

Remember you can see your "Role" in the upper right hand part of the screen.



This method is preferred for locating a project because it narrows the results so you can find the project you're looking for without having to scroll through multiple screens. You can also just type in a "Project Number" if you know it and just Search for that one project. If you're only looking for Round 16 projects select 16 from the Round option and then search.

➤ Click "Search" The sample below selected the Conservation Initiatives category and Round 11 as the parameters. The result was the sole active Round 11 project, BR72. This screen gives you a good snapshot of the project and basic status information as well as program manager's comments and instructions, if applicable.



The next screen shot shows what is returned when "Project Menu" is selected, in this case for BR72 in Conservation Initiatives.



SNPLMA Management And Reporting Tool



System Administrator

Approved

03/31/2014

Financial Input: FY 2018 Qtr 2 / Status Input: FY 2018 Qtr 1 Project Uploads Reports (Hyp) Reports Admin Logout SMART LEST

Projects [collapse]

Capital Improvements

Conservation Initiatives

Eastern Nevada Landscape Restoration Project

Environmentally Sensitive Land Acquisitions

Hazardous Fuels Reduction Plans and Wildfire Prevention Projects

<u>Lake Tahoe Restoration</u> <u>Projects</u>

Multi-Species Habitat Conservation Plans

Parks, Trails, and Natural Areas

Pre-Proposal Planning (PPP)

Santini-Burton

Virgin River Habitat Conservation Restoration Plan and Ground Water Monitoring

Return to Project Search Results		
PROJECT MENU: (BR72, 11-1, Cu	LTURAL SITE STEWARDSHIP FOR (CLARK COUNTY, NEVADA)
Work Plan Approved. Work Plans are viewable from the Reports Menu.	Quarterly Status Update	FY 2017 Annual Accomplishments Enter Annual Accomplishments
Funding Processes	Project Contacts	Project Project Priority

Project Information

Project Of Concern: No Work Plan Status: Project Status: Closed Current End Date:

Status Date: 09/19/2014

Status Update

Comments and Program

Mgr. Notes:

<u>Project Number as the Sole Search Parameter</u>: Selecting only a project number will result in a list of all active projects your access allows for you to see, regardless of category, with that project number. The sample below for FW15 resulted in two projects, one a Capital Improvement and one an interagency Conservation Initiative.



ACCESSING PROJECT MENU SELECTIONS

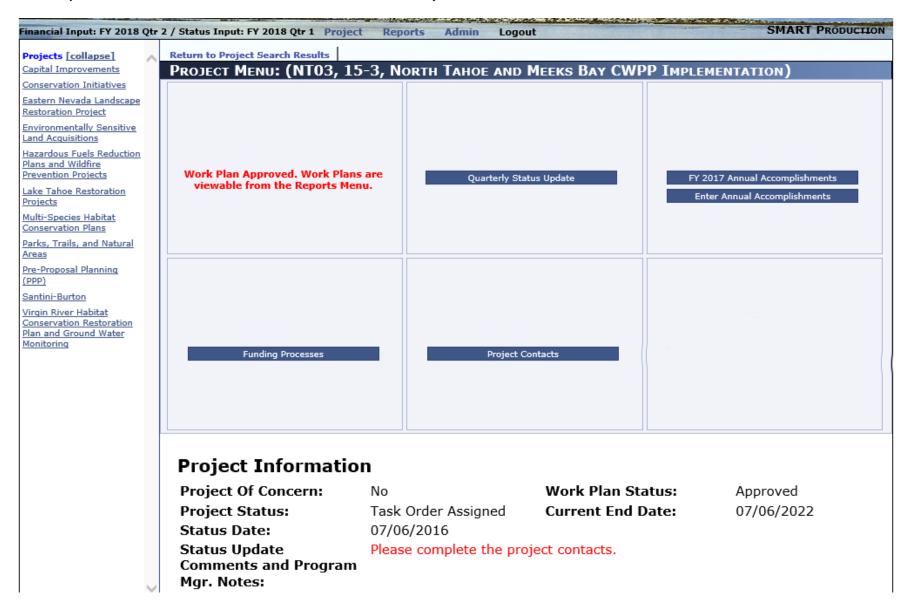
After locating the project you want to update, you need to access the project menu.

> Click on the "Project Menu" box to the right next to the project number.



The Project Menu screen will be displayed. The sample below is for a Hazardous Fuels Project Round 15-3.

The Project Menu screen has five menu boxes available to Entity users.



If trying to access the "Project Menu" and you encounter this screen view it is because you are logged into SMART when it is closed for input. You can still run reports and get info should you need to.

PROJECT MENU: (NP93, 12-1, LI	EHMAN CAVE VISITOR CENTER CAM	pus, Access & Fire Safety)
No Access For WorkPlan.	No Access For Quarterly Status.	No Access For Annual Accomplishments.
No Access For Fund Requests.	Project Contacts	

Project Information

If you find that you need to enter something you will either need to wait until it is open or contact your Program Manager and discuss you needs with him/her.

From top left to right, the menu boxes are:

Work Plan: The Work Plan menu box (first block, top row) is only available when a new workplan is required for a new project or if the Program Manager (PM) has indicated that updates to the Workplan are needed.

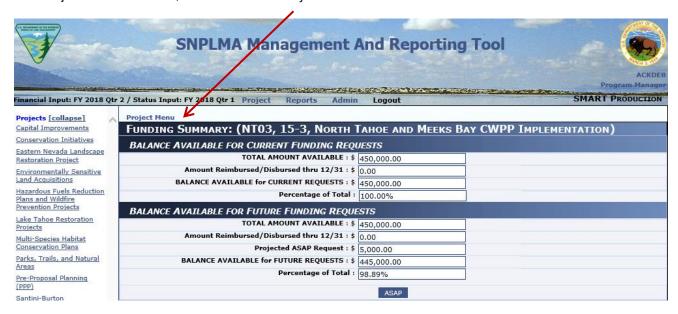
<u>Quarterly Status Update</u>: This menu box provides access to enter all quarterly status information: percent complete overall, percent complete by deliverable, actual start and end dates for deliverables, and narrative status comments.

Annual Accomplishments: This menu box has two selections. The top selection is to display the previous year's annual accomplishment for reference only and is not to be edited. The second selection is for entering the current fiscal year's annual accomplishment's and where you enter your Performance Measures. There is also a checkbox labeled "Final Overall Accomplishment" to indicate that the information entered is the overall project accomplishment description required upon closeout of the project.

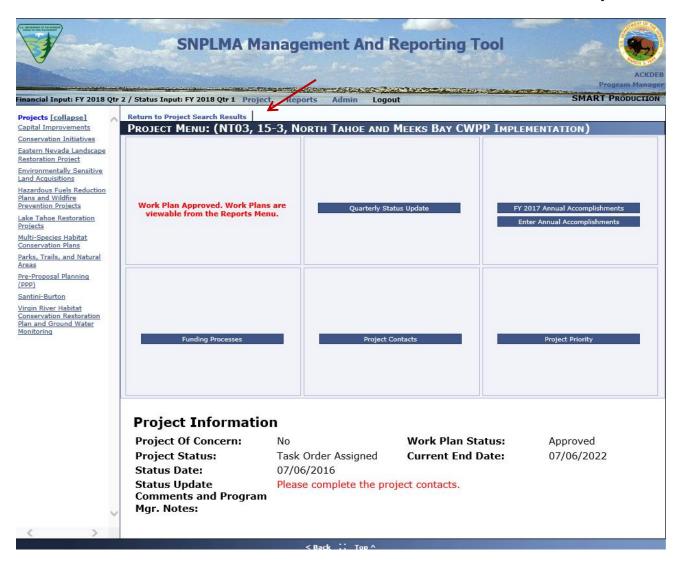
<u>Funding Processes:</u> This menu box allows you to enter the current funding needs for your projects and where you to enter the amount obligated/expended dollars.

<u>Project Contacts</u>: This menu box allows you to verify or update project contact information. Please confirm each quarter that this information (names, email addresses, phone numbers) are correct. This choice is available regardless of whether SMART is open or not. Note: You can only have one Project Manager if you are entering a new one delete the old one first.

Navigating the Project Menu Screen: In the example below, the "Funding Processes" menu box has been accessed. To return to the Project Menu Screen, click the blue "Project Menu" selection above the title bar.



If the Project Menu Screen was accessed using the "Project" menu and selected parameters, you can move to another project in the same search. > Click on "Return to Search Results" above the title row on the Project Menu Screen.



This will return you to the search results (see below) based on the parameters that had been previously entered.



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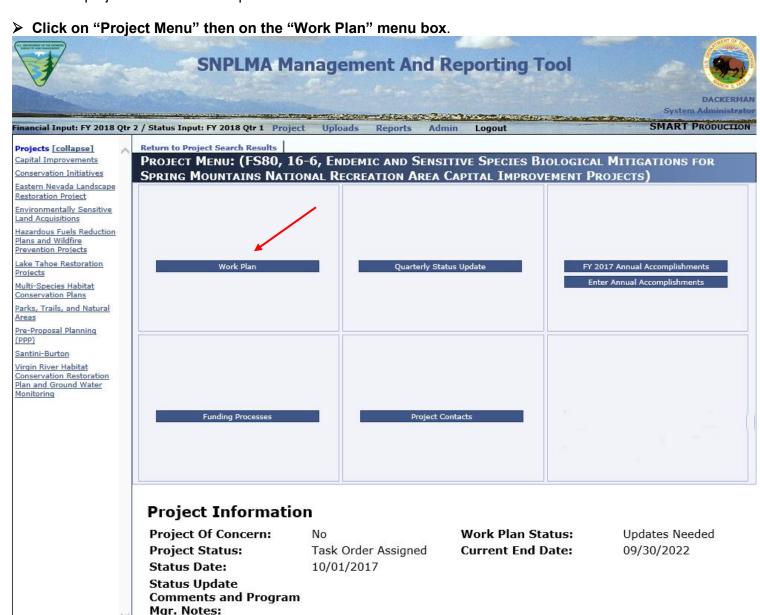


								Progran	ACKDEB n Manager
Financial Input: FY 2018 Qt	r 2 / Status Input: FY 2018	Qtr 1 Project Repor		gout	and discount.	1112	SI	ART Pro	DUCTION
Projects [collapse] Capital Improvements Conservation Initiatives	SEARCH PROJECT				1111				
Eastern Nevada Landscape Restoration Project Environmentally Sensitive Land Acquisitions Hazardous Fuels Reduction Plans and Wildfire Prevention Projects Lake Tahoe Restoration Projects Multi-Species Habitat	Project Number : Sub Activity : Round : Managing Entity : Status :	NT03 Please Select Please Select Please Select Please Select	Searc		~				
Conservation Plans Parks, Trails, and Natural Areas Pre-Proposal Planning (PPP)	One item found.								
Santini-Burton Virgin River Habitat Conservation Restoration Plan and Ground Water Monitoring	Program Category Hazardous Fuels Reducti Plans and Wildfire Prevention Projects Project Name		POC	oncern: No us POC: No C Color: Green	Round 15	Priority 3	Managing (Lead) Entity North Lake Tahoe Fire Protection District	NT03 Project # NT03 Proj Mer SN/ Lea	nu AP
	Work Plan Status: App Project Status: Tas Status Date: 07/	roved k Order Assigned 06/2016 06/2022	Status Update Comments and Program Mgr. Notes Project Manager:	Please comp	San NesaW	roject coni	tacts.	SNA]

The user can now select another project to update from the original search by selecting "Project Menu" or locate a new project by entering new search parameters.

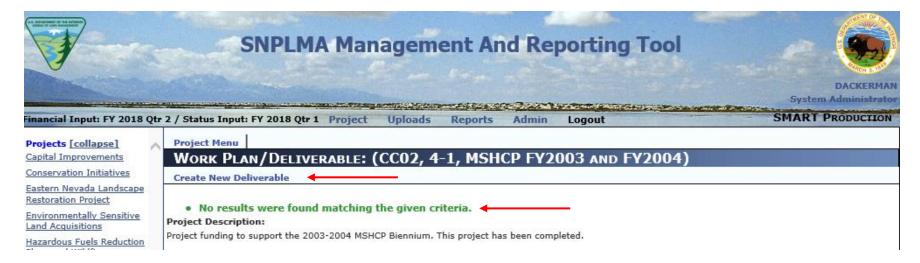
STEP 1: CREATING A WORKPLAN FOR NEW PROJECTS

Locate the project for which a workplan is needed.

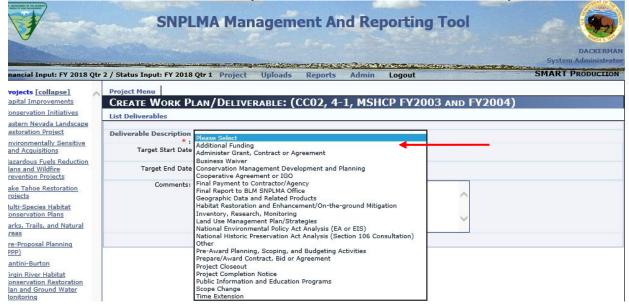


The following screen displays with the message that no results were found because no deliverables, tasks, or subtasks have yet been entered.

> Click on Create New Deliverable

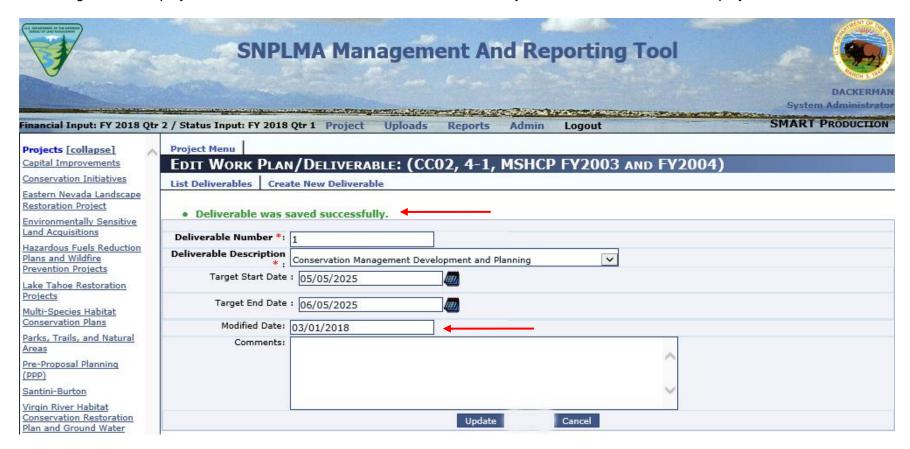


Select a deliverable from the drop down menu for "Deliverable Description."



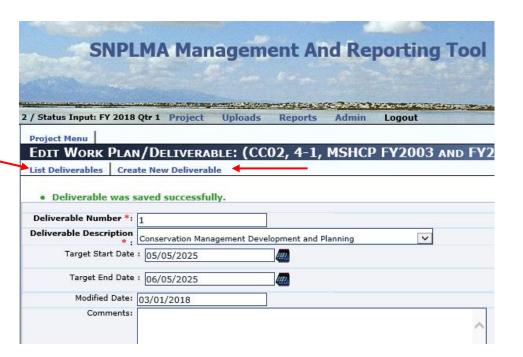
> Enter the Target Start and Target End Dates; Comments if needed. > Click "Save"

A message will be displayed that the deliverable has been saved successfully, and the date modified will display.

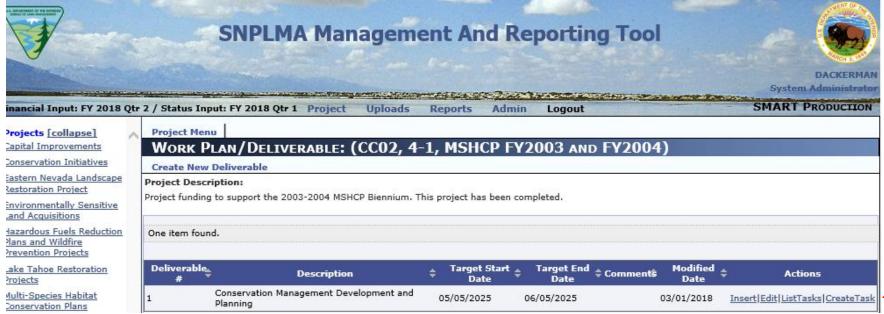


Review your entry. If you need to make a change to the entered dates or comments, do so and then click update. When you are satisfied with the deliverable entry, you can move on to entering tasks/subtasks for this deliverable, or enter a new deliverable.

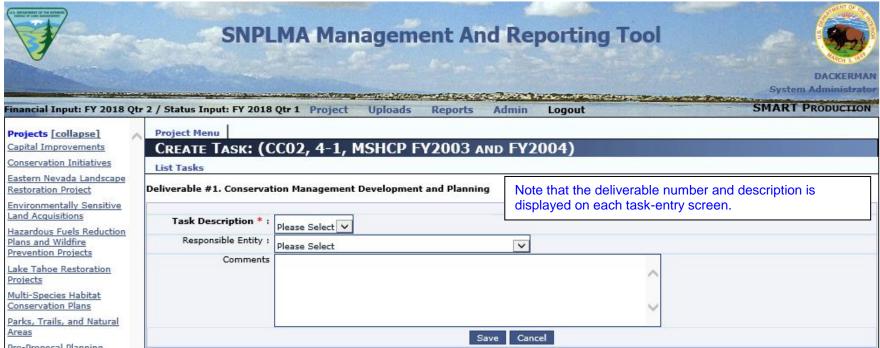
- Click on "List Deliverables" to enter tasks or subtasks for the deliverable.
- > Click on "Create New Deliverable" to enter the next deliverable.



Click "Create Tasks."

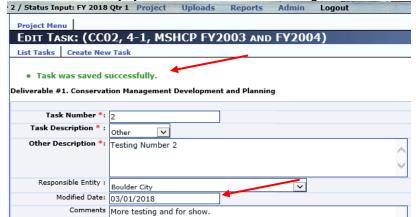


> Enter the task description and any comments. >Select the Responsible Entity > Click "Save"

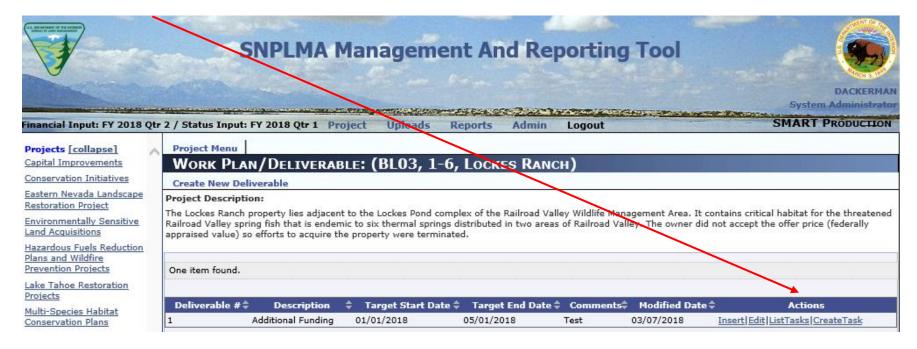


A message will be displayed that the task has been saved, and the date modified will display.

Review your entry. If you need to make a change in the description or comments, do so and then click update. When you are satisfied with the task entry, you can move on to entering subtasks for this task, or enter a new task for the displayed deliverable.

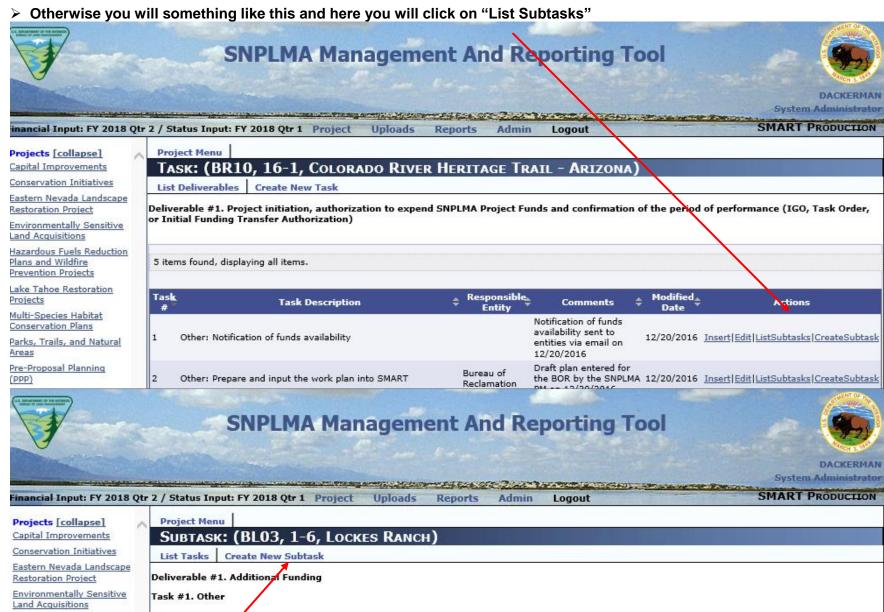


Click on "List Tasks" to enter subtasks or to create an additional new task for the deliverable.



> After clicking on "List Tasks" if you get this screen you will need to enter your task.





This screen will show you all the task, this sample only has one and you can see what the Deliverable is and the Task #.

Click on "Create New Subtask"

> Enter the subtask description and any comments. >Select the Responsible Entity > Click "Save"

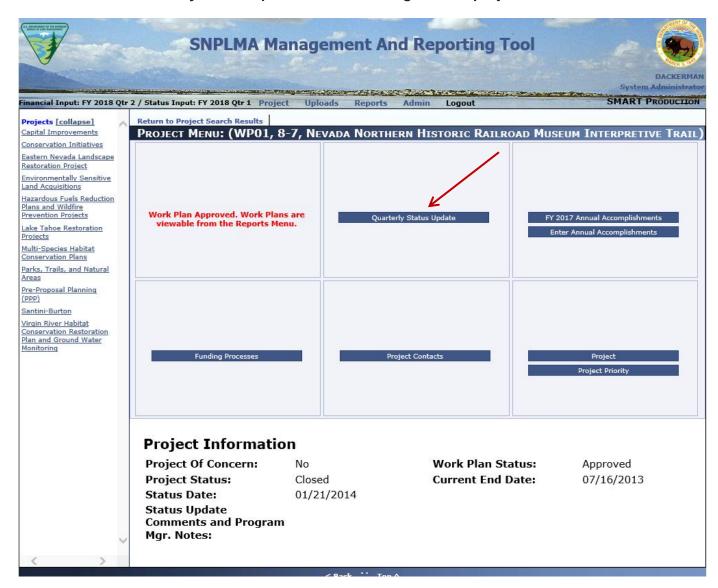


As with the deliverables and tasks, a message will be displayed that the subtask has been saved. You can review, edit if needed, and click update before moving to enter the next subtask, task, or deliverable.

> To enter a new Deliverable, back out of the subtask screen by clicking "List Subtasks," "List Tasks," and "List Deliverables." This sequence will take you back to the "Create New Deliverable" screen with the project description.

STEP 2: UPDATING QUARTERLY STATUS

- > Click on the "Project Menu" box of the project to be updated.
- > Click on the "Quarterly Status Update" menu box to get to the project deliverables.





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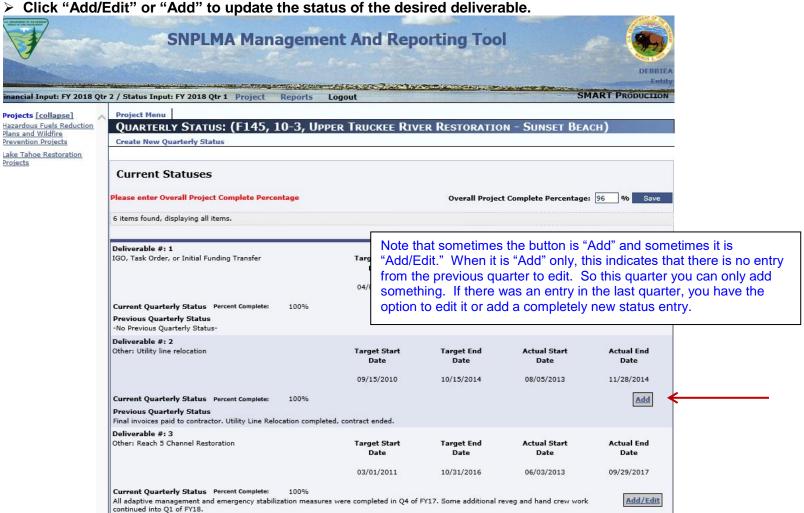


2018 Qtr 2 / Status Input: FY 2018 Qtr 1 Project Reports	Logout		SI	MART PRODUCTE
Project Menu				
QUARTERLY STATUS: (F163, 11-14,	RESTORATION OF F	IRE ADAPTED M	LEADOW ECOSYS	TEMS)
Create New Quarterly Status				the second secon
ion .				
Current Statuses				
Please enter Overall Project Complete Percentage		Overall Projec	t Complete Percentage	: 77 % Save
4 items found, displaying all items.				
Deliverable #: 1				
IGO, Task Order, or Initial Funding Transfer	Target Start Date	Target End Date	Actual Start Date	Actual End Date
	10/01/2011	12/31/2016	02/01/2012	12/31/2016
Current Quarterly Status Percent Complete: 100%				Add
Previous Quarterly Status All funds are with the USFS, the most recent transfer is not	yet on the LTBMU but is with I	USFS Regional Office for	processing.	1100
Deliverable #: 2				
Restoration and/or maintenance of proper function to waterways, watersheds, or landscapes	Target Start	Target End	Actual Start	Actual End
waterways, waterstreas, or landscapes	Date	Date	Date	Date
	10/01/2012	11/30/2016	12/23/2015	
Current Quarterly Status Percent Complete: 80% Benwood meadow was treated to fulfill the contract awarde	d in FY17. We prepped Baldwir	n meadow for contract a	ward and treatment in FY:	Add/Edit
Previous Quarterly Status				
		ar Meadow that were ex-	cluded from the contract a	area.
We awarded a contract to thin conifers from Benwood and salso worked with internal crews and crews from the Washov Benwood meadow is expected to be treated at the beginnin				
also worked with internal crews and crews from the Washoo				reneration and contract
also worked with internal crews and crews from the Washo Benwood meadow is expected to be treated at the beginnin		Target End Date	Actual Start Date	Actual End Date
also worked with internal crews and crews from the Washoo Benwood meadow is expected to be treated at the beginnin Deliverable #: 3	g of FY18. We prepped Baldwii Target Start			
also worked with internal crews and crews from the Washot Benwood meadow is expected to be treated at the beginnin Deliverable #: 3	g of FY18. We prepped Baldwii Target Start Date	Date	Date	
also worked with internal crews and crews from the Washor Benwood meadow is expected to be treated at the beginnin Deliverable #: 3 Other: Effectiveness Monitoring and Coordination	g of FY18. We prepped Baldwii Target Start Date 09/30/2014	Date 11/30/2016	Date 07/13/2016	Date

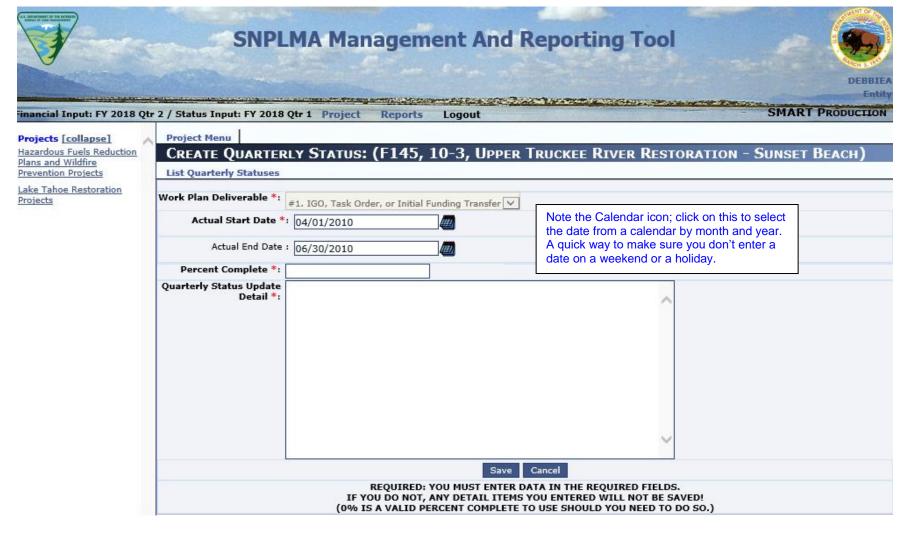
- The list of deliverables will display the previous quarter's status comments and percent complete if previously entered.
- It will also display actual start and end dates if entered as well as the percent overall project completion.
- If there are more deliverables than can be displayed on a single page, additional deliverables are available on additional pages.

Click on the page number of "Next/Last" in the row above the first deliverable to access additional deliverables.





• Actual Start Date and Percent Complete are required in order to enter/update the status for a deliverable.

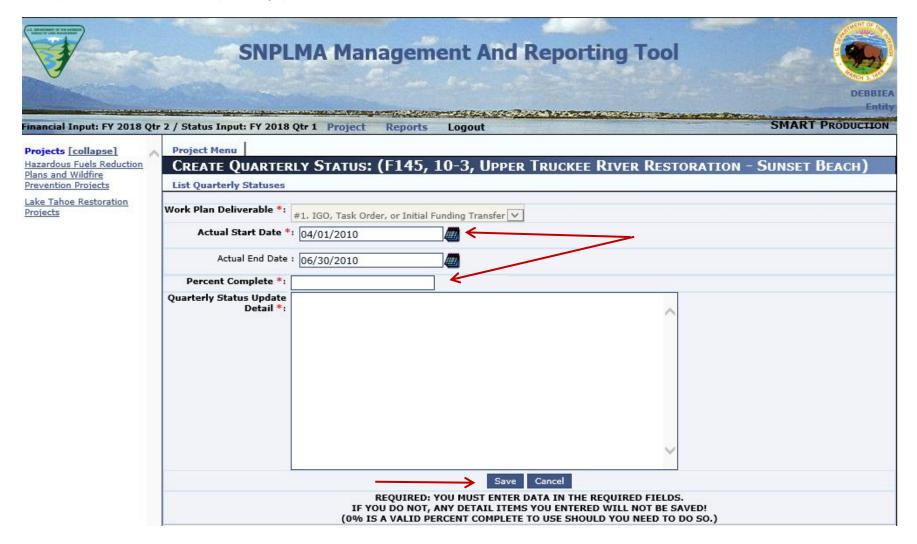


Please by sure to enter only "ACTUAL" Start and End Dates in the Actual Start Date and Actual End Date buckets. A guess as to what those dates will be are just that, a guess, an actual date cannot be in the future it has to have come to pass already.

0% is also a valid Percent Complete to use here.

- > Enter the Actual Start Date
- > Enter the Percent complete as a whole number (e.g., 5, , 25, 50 75, 97, etc.) and do not include a percent sign
- > Enter the Actual End Date only if the deliverable is 100 percent complete
- > Enter the narrative describing the status of the project.

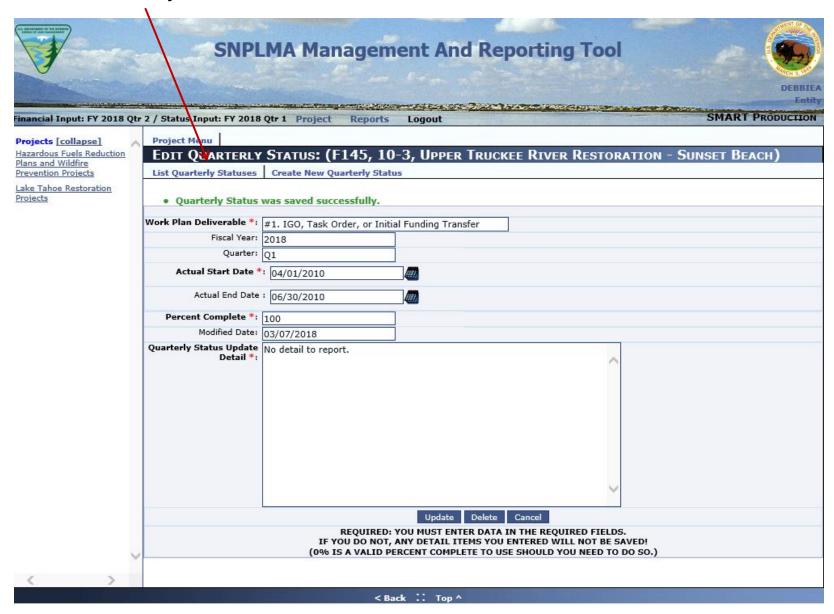
(Status can include work that has been done, issues that are being addressed and the status of resolution, as well as work that is anticipated to be done in the upcoming quarter.)



> Click "Save" when done entering current status information.

After completing the entry and clicking "Save" the screen will display a message that the "Quarterly Status was saved successfully." It is recommended that the user review the entry to ensure that it's correct before moving on the the next deliverable.

> Click "List Quarterly Statuses" to return to the list of deliverables.



The updated information is now reflected under the deliverable(s) that have been updated. Note that instead of an "Add" button, there is now an "Add/Edit" button; this indicates the deliverable has been updated and provides a means to edit the entry if needed.

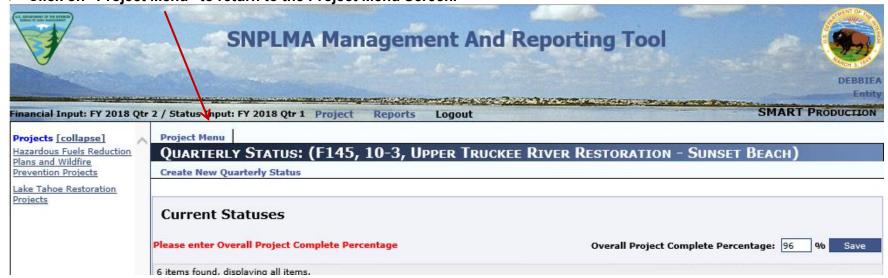


Repeat this process until all deliverables for the project have been updated.

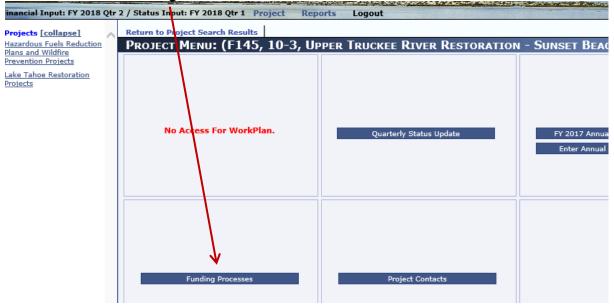
STEP 3: FUNDING REQUESTS

After updating the status of the deliverables the next step is requesting funding.

Click on "Project Menu" to return to the Project Menu Screen.



Click on the "Funding Processes" menu box.

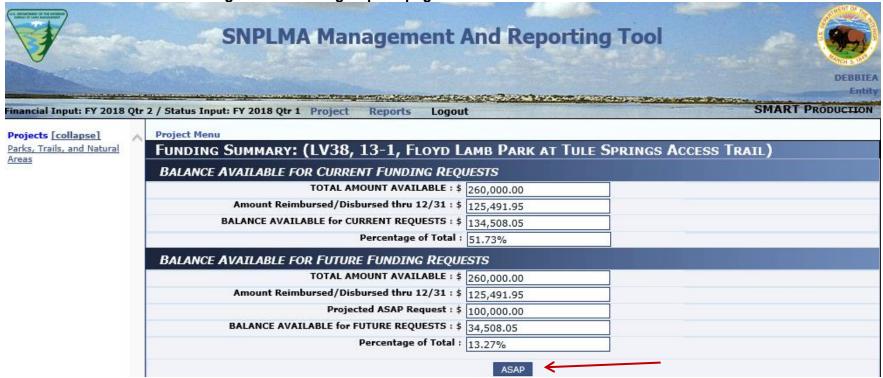


Note: Funding Requests can be edited. After saving, entity users will see an "update" button. Changes can be made or additional information can be added and then click the "update" button.

ASAP Funding Request

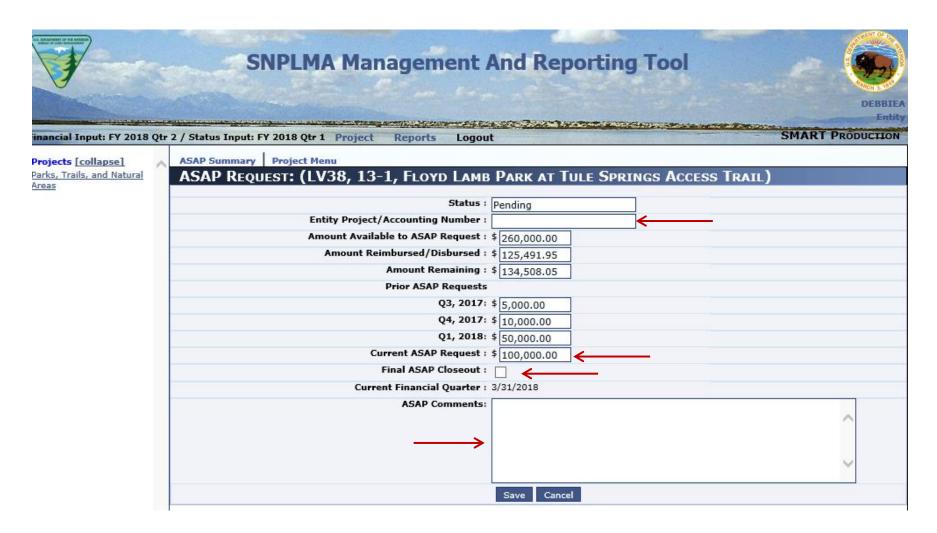
The first screen is the financial summary page. The information provided is the same as the information on the financial summary page in the ACCESS database. No entries are made on this page.

> Click on the ASAP button to go to the funding request page.



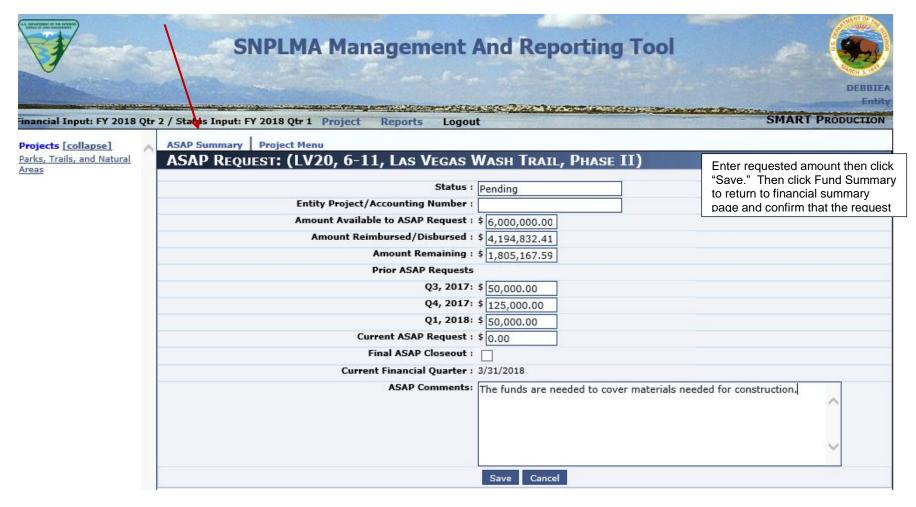
Users can enter information into four fields on the ASAP fund request page:

- "Entity Project/Accounting Number" Completing this field is optional
- "Current ASAP Request" This amount will be reflected on the financial summary page after
- "Final ASAP Closeout" Click this box only when the project is being closed out.
- "ASAP Comments" -- Explain/justify the Current ASAP request amount (i.e., purpose of funds that will be drawn down).



In the example below, the "Current ASAP Request" is \$50,000 (entered without symbols or commas) and the purpose of the request to purchase materials has been entered in "ASAP Comments."

> Click Save after entering the request amount, justification comments, and other appropriate information.



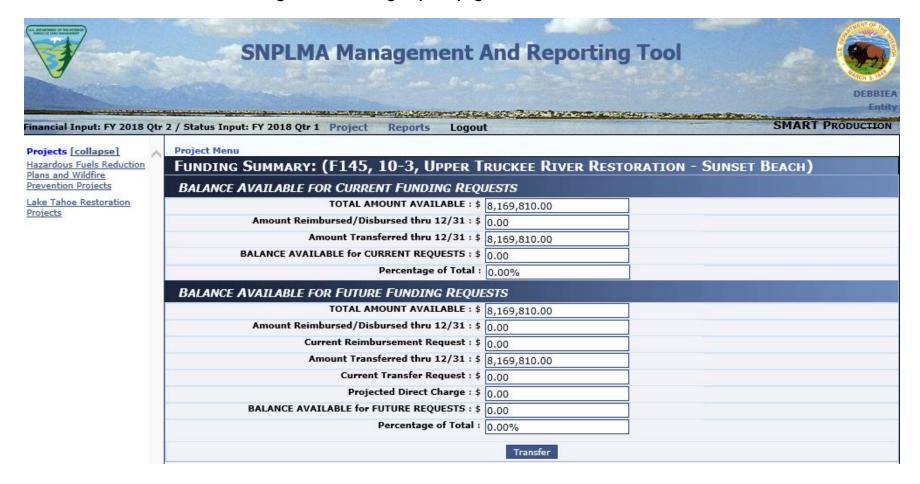
After clicking "save," a message in green text "Financial Request was saved successfully" will appear in the upper left portion of the screen (no screen shot available of this for ASAP at this time).

➤ Click "ASAP Summary" to return to the financial summary page. Review the fund summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" has been recalculated reflecting a reduction equal to the amount requested.

Transfer Funding Request

Each funding request method works essentially the same with only slight differences. The screen shot below is the Financial Summary page for a project funded by 1151 direct transfer. No entries are made on this page.

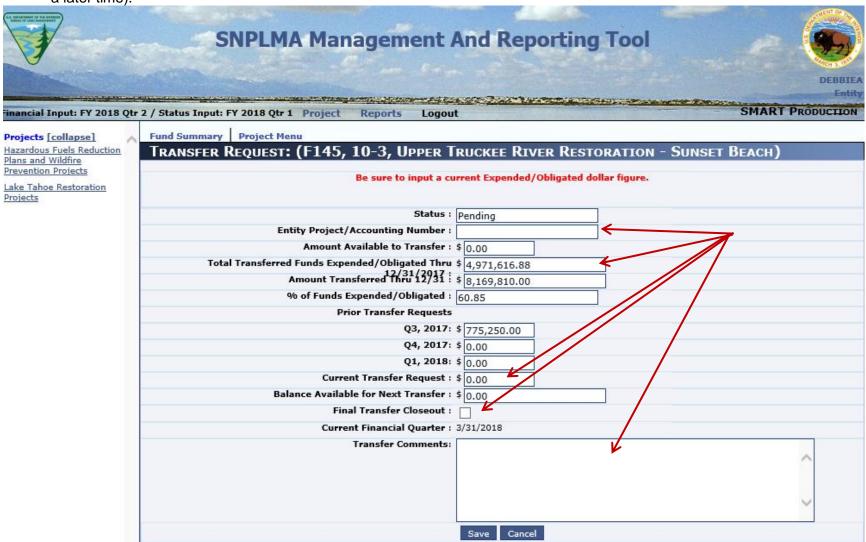
> Click on the "Transfer" button to go to the funding request page.



(Note: Although there are fields for "Current Reimbursement Request" and "Current Direct Charge" as well as "Current Transfer Request," only the appropriate type of funding for the selected project will be available. In this F145 example, as in many other Federal projects, the sole method of funding is direct transfer. However, some older projects were funded first by reimbursement and then by direct transfer, or by reimbursement and then direct charge, so more than one funding method button may appear. If this occurs, only the current funding method should be selected.)

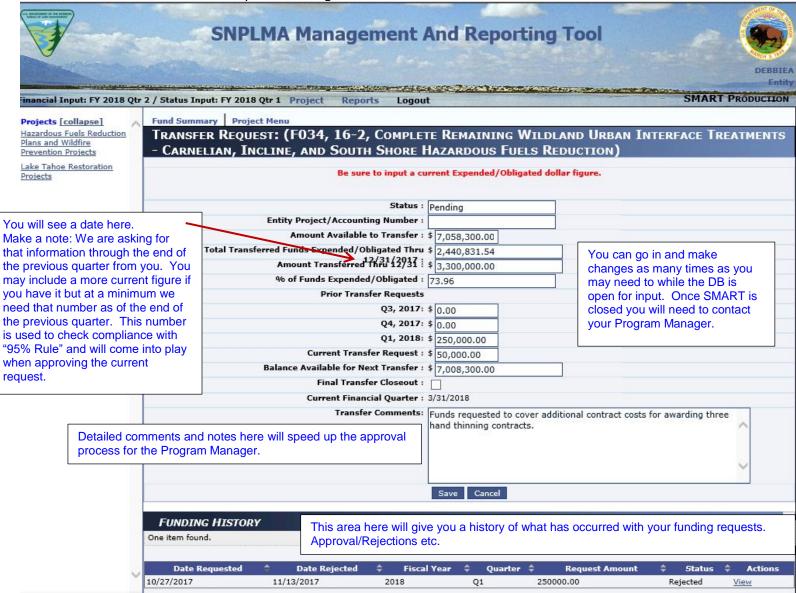
Entities can enter information in five fields on the Transfer fund request page:

- "Entity Project/Accounting Number" Completing this field is optional
- "Total Transferred Funds Expended/Obligated Thru ..." This information is required.
- "Current Transfer Request" This amount will be reflected on the financial summary page after
- "Final Transfer Closeout" Click this box only when the project is being closed out.
- "Transfer Comments" Explain/justify the Current Transfer request amount (i.e., why the funds are needed in this quarter vs. at a later time).



> Click "Save" after entering the required information.

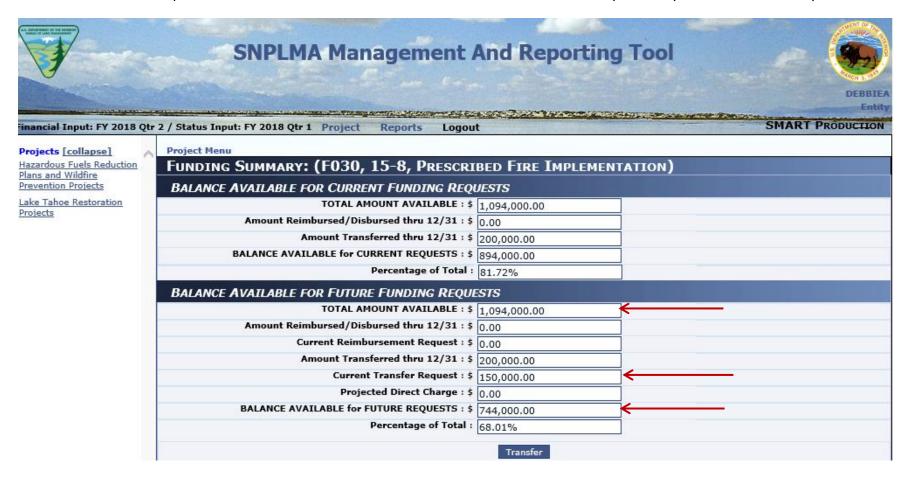
The example below has entries under "Total Transferred Funds Expended/Obligated Thru #/##/###," "Current Transfer Request" and explanation/justification under "Transfer Comments" for the \$50,000 transfer request. After clicking "update" the "Financial Request was saved successfully" message appears and the "% of Funds Expended/Obligated" is automatically calculated based on the entry under "Total Transferred Funds Expended/Obligated Thru #/##/##"



> Click on "Fund Summary" to return to the financial summary page.



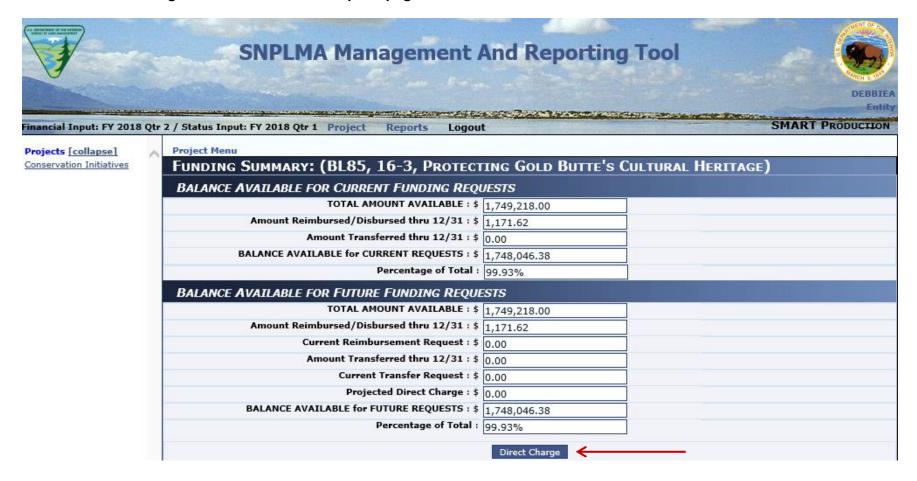
It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" reflects a reduction to the "Balance Available for Current Requests" equal to the amount requested.



Direct Charge Funding Request

Most BLM projects are now funded by direct charge. The direct charge Financial Summary has the same fields as projects funded by Transfer. As with all funding methods, no entries are made on this page.

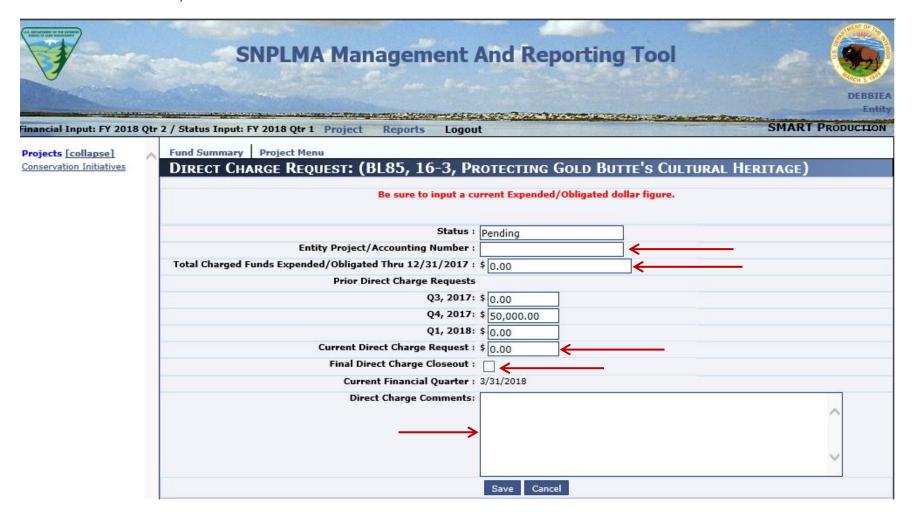
> Click "Direct Charge" to access the fund request page.



For projects funded by Direct Charge, the amount is reflected as "Amount Reimbursed/Disbursed through ##/###" this is the amount that has been paid and does not include amounts obligated on contracts/agreements but not yet paid (i.e., unliquidated obligations).

Entities can enter information in five fields on the Direct Charge fund request page:

- "Entity Project/Accounting Number" Completing this field is optional
- "Total Charged Funds Expended/Obligated Thru ##/###" Though not required to enter the funding request, this information is used by the SNPLMA Division to help evaluate the funding request and should be entered if available.
- "Current Direct Charge Request" This amount will be reflected on the financial summary page after
- "Final Direct Charge Closeout" Click this box only when the project is being closed out.
- "Direct Charge Comments" Explain/justify the Current Transfer request amount (i.e., why the funds are needed in this quarter vs. at a later time).

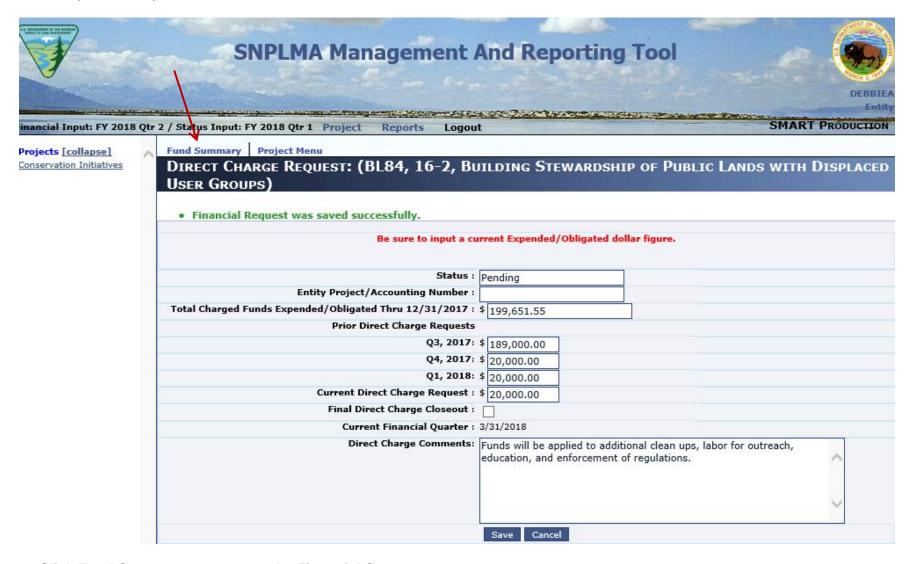


In this example, \$200,000 has been entered as "Total Charged Funds Expended/Obligated" – this figure includes amounts obligated on contracts/agreements but not yet paid (i.e., unliquidated obligations). In this example, the current direct charge request of \$25,000 is entered as is the explanation/justification for why the funds will be needed this quarter.

Singaporal Input: FY 2018 Ot	SNPLMA Management		DEBBIEA Entity SMART PRODUCTION
Projects [collapse]	Fund Summary Project Menu		
Conservation Initiatives	DIRECT CHARGE REQUEST: (BL84, 16-2, BUILDING STEWARDSHIP OF PUBLIC LANDS WITH DISPLACED USER GROUPS) Be sure to input a current Expended/Obligated dollar figure.		
	Status :	Pending	
	Entity Project/Accounting Number :		
	Total Charged Funds Expended/Obligated Thru 12/31/2017 :	\$ 199,651.55	
	Prior Direct Charge Requests		
	Q3, 2017:	\$ 189,000.00	
		\$ 20,000.00	
	Q1, 2018:	\$ 20,000.00	
	Current Direct Charge Request :		
	Final Direct Charge Closeout :		
	Current Financial Quarter :	3/31/2018	V
	Direct Charge Comments:	Funds will be applied to additional clean ups, labor for deducation, and enforcement of regulations.	utreach,
		Save Cancel	

> Click "Save"

After clicking "save," a message in green text "Financial Request was saved successfully" will appear in the upper left portion of the screen. (See below.)

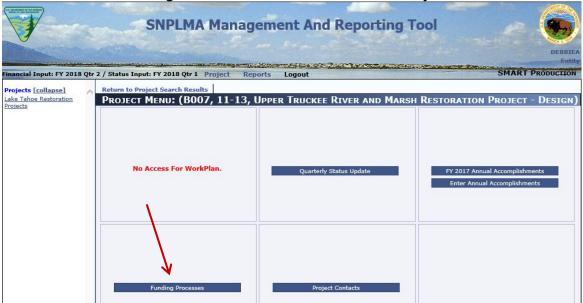


> Click Fund Summary to return to the Financial Summary page.

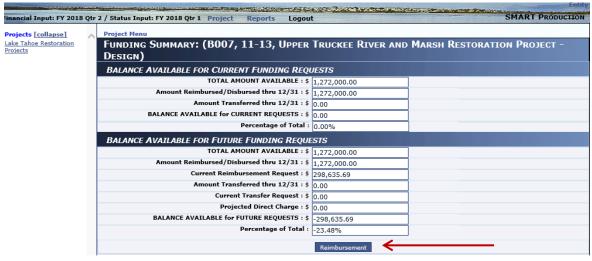
It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" has been recalculated reflecting a reduction equal to the amount requested to confirm the data entered is reflected correctly on the Financial Summary page.

Reimbursement Funding Requests

> Click on the "Funding Processes" menu box from the Project Menu Screen

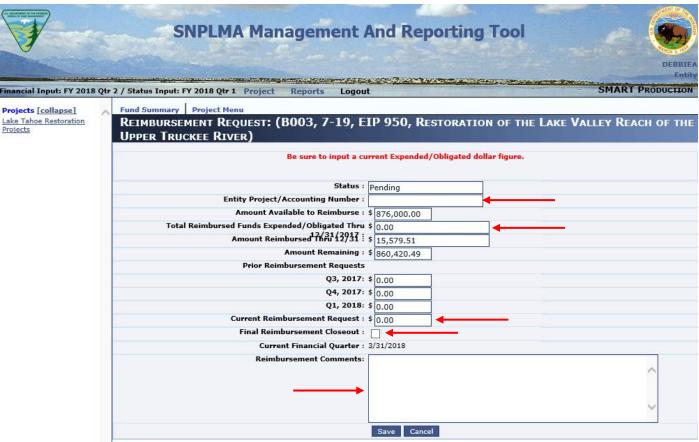


> Click on "Reimbursement"



Entities can enter information in five fields on the Reimbursement fund request page:

- "Entity Project/Accounting Number" Completing this field is optional
- "Total Reimbursed Funds Expended/Obligated Thru ..." Though not required to enter the funding request, this information is used by the SNPLMA Division to help evaluate the funding request and should be entered if available.
- "Current Reimbursement Request" This amount will be reflected on the financial summary page after saving/updating
- "Final Reimbursement Closeout" Click this box only when the project is being closed out.
- "Reimbursement Comments" Explain/justify the Current Reimbursement request amount (i.e., why the funds are needed in this quarter vs. at a later time).
- > Make the appropriate entries, then click "Save" or "Update" (The screen print below shows "update" because it was edited during final testing of the application.)

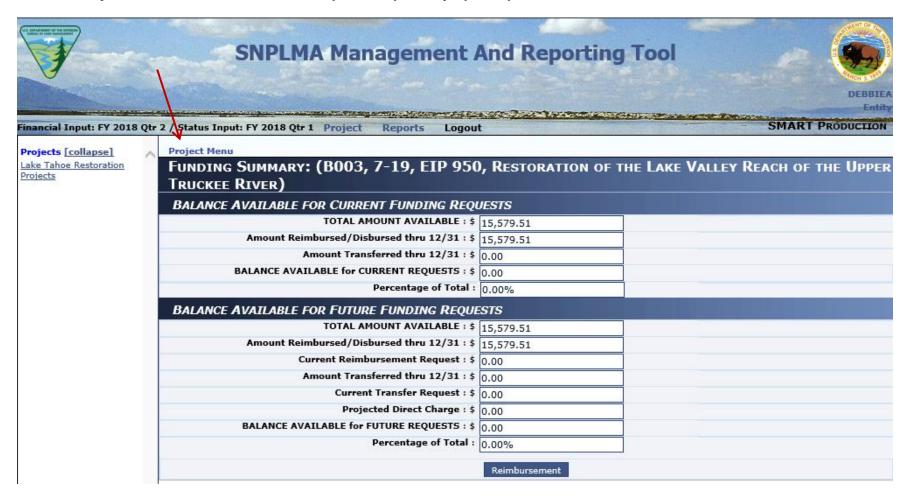


After clicking "Save" a message in green text "Financial Request was saved successfully" will appear in the upper left portion of the screen.

Click Fund Summary to return to the Financial Summary page.

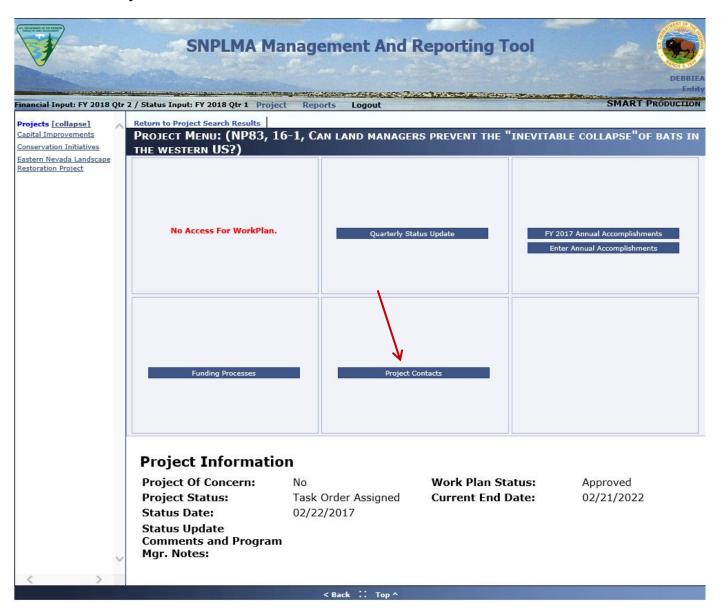
It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the "Balance Available for Future Requests" has been recalculated reflecting a reduction equal to the amount requested to confirm the data entered is reflected correctly on the Financial Summary page.

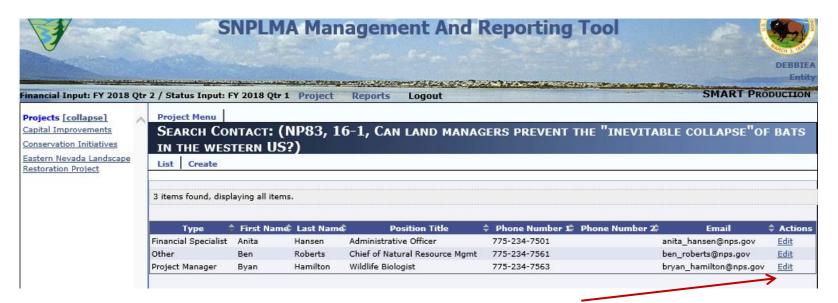
> Click Project Menu to move to the next step in the quarterly update process.



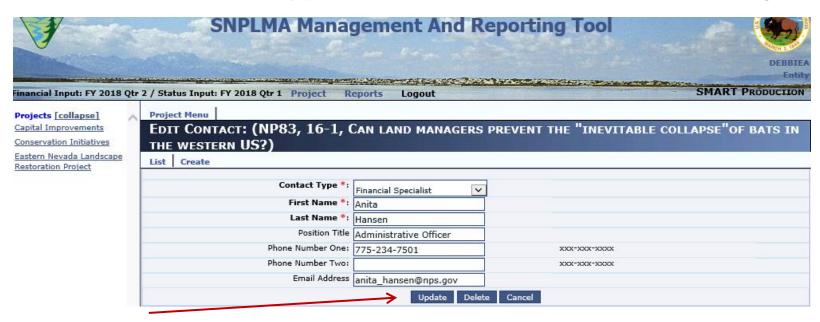
STEP 4: CONTACTS

> Click the "Project Contacts" menu box.





Review the contact information for accuracy (phone numbers, emails, etc.). > Click "Edit" to make needed changes.

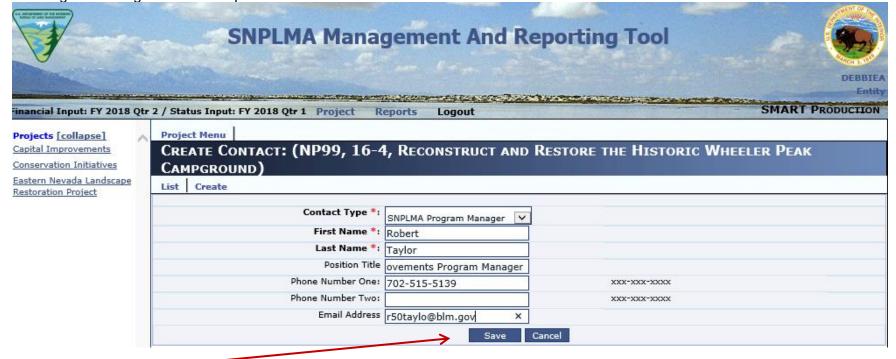


> Click "Update" when changes are complete.

Click "Create" to add a new contact.

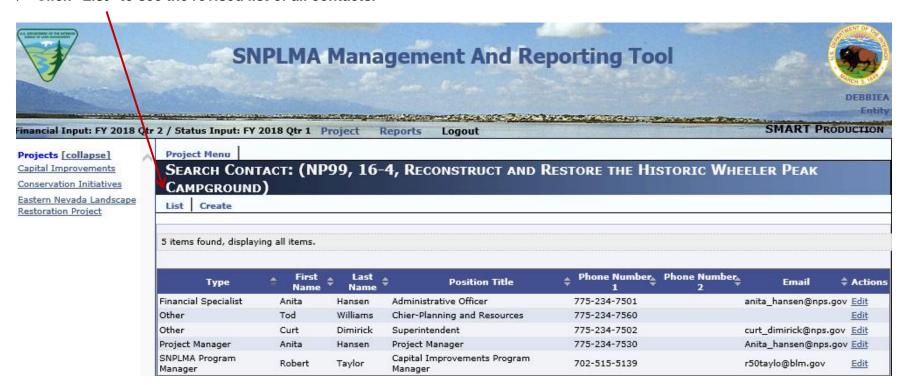


There can be only one contact designated as the "Project Manager." If a project manager has already been designated, the "Project Manager" will not display as a choice in the drop-down for Contact Type. You will have to "Delete" the existing Project Manager". Other choices are financial specialist, SNAP, Other, and SNPLMA Program Manager. Robert Taylor has been entered as the Program Manager in the example below.



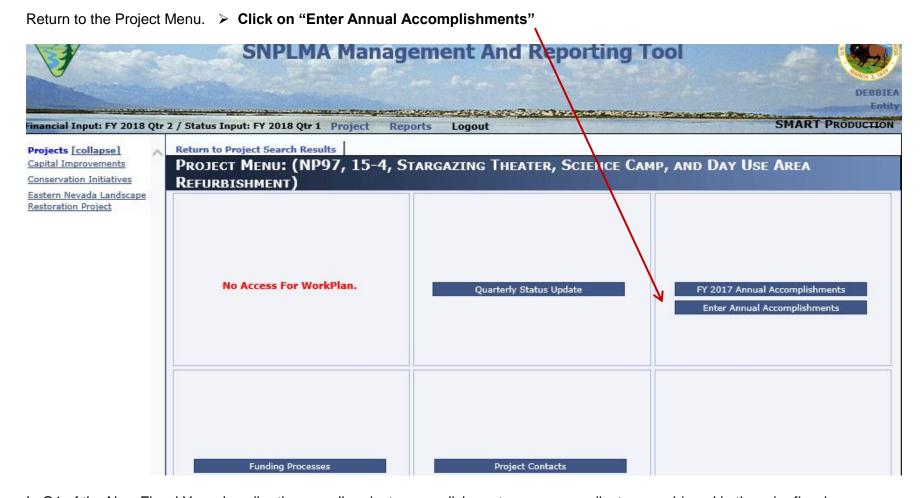
> Click "Save" when done entering the information for the new contact. A message will appear that the "Contact was saved successfully."

Click "List" to see the revised list of all contacts.



STEP 5: ANNUAL ACCOMPLISHMENTS

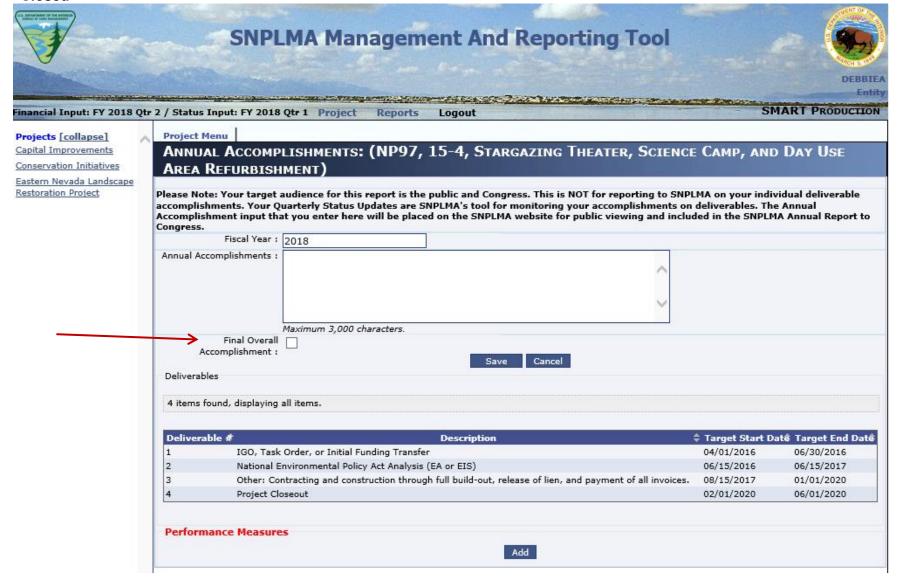
There are two times that partners must enter annual accomplishments. One time is in the first quarterly report of a new fiscal year for the previous fiscal year and the other is at project closeout.



In Q1 of the New Fiscal Year describe the overall project accomplishments, progress, milestones achieved in the prior fiscal year. Double check with your Program Manager on specific requirements and needs.

Project Closeout: Summarize the <u>overall project accomplishments</u> from beginning through completion. Closeout accomplishments must include the SNPLMA performance measures with applicable numeric measurement accomplished by the project (see Appendix J-3 in the Implementation Agreement – Part II, dated February 5, 2013, for the performance measures).

> Click the Checkbox for "Final Overall Accomplishment" if it is the last time you will be reporting and the project is going to "Closed"

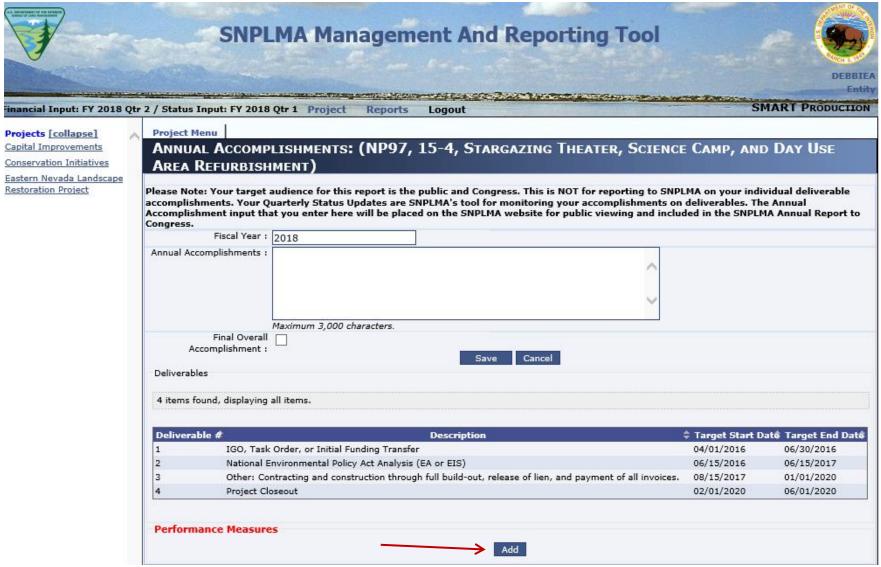


> Click "Save" when done entering your Accomplishment.

STEP 6: Performance Measures

Performance Measure can now be entered separate and no longer included with your Annual Accomplishment's Narrative. The choices available for you to choose from are customized to your particular program.

> Click the "Add" button under the Deliverable list on the Annual Accomplishments page when you are ready to enter your Performance Measures.



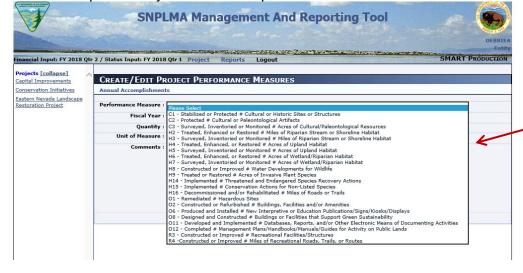


SNPLMA Management And Reporting Tool



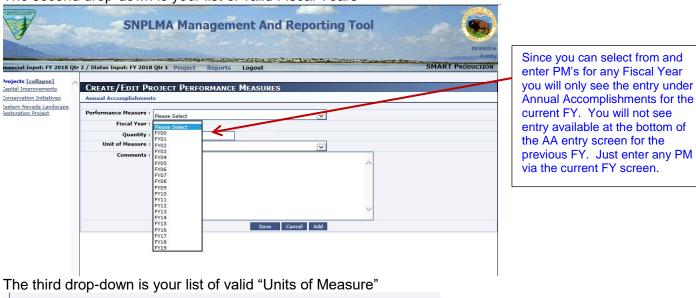


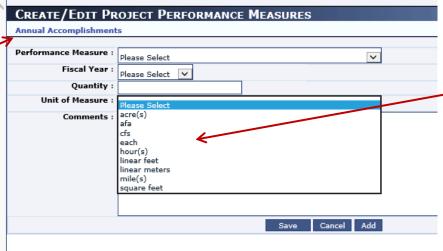
The first drop-down is your list of valid performance measures.



You will be entering each performance measure one at a time. You will only see the PM's that are relevant to your program.

The second drop-down is your list of valid Fiscal Years





You may notice that there is not a "Delete" button. If you make a mistake contact your Program Manager and let them know. This entry here in SMART is only for gathering the data it is then taken from here and exported to the SNPLMA Financial DB where it can be used for reporting.

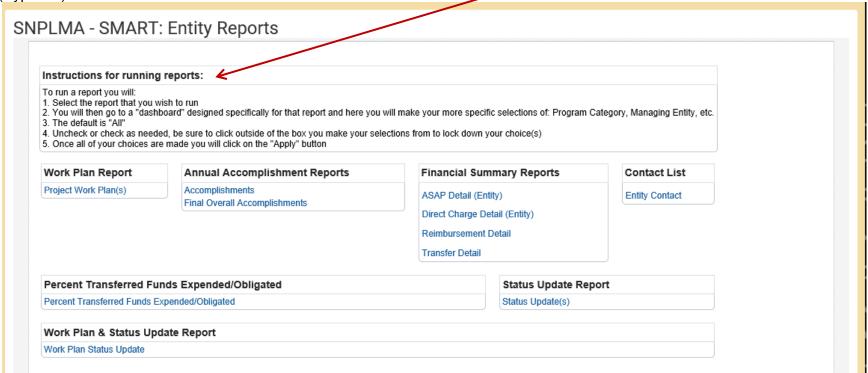
> Click the Save when you are done entering your PM and then Add to enter the next one. You will back out of this screen by clicking on Annual Accomplishments.

Step 7: ACCESSING REPORTS



> Click on Reports from any page to get to the Report menu. Reports are opened in a new window so closing reports will not close SMART.

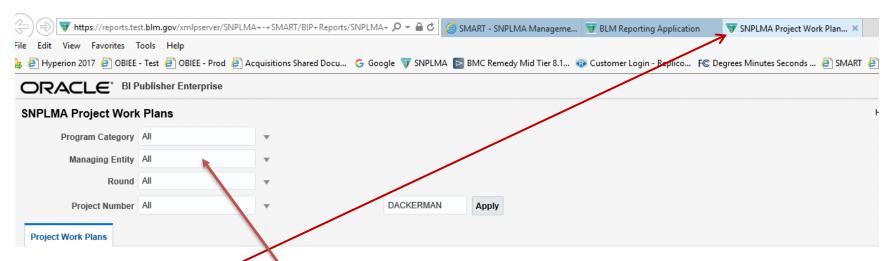
Reports are done using a new application referred to as OBIEE and now operate a bit differently from the old reporting application (Hyperion).



New instructions are included at the top of the screen to help you out. I will go though some of the quirks of using this new application here.

1st now you will select your report. Previously you made your parameter selections prior to selecting your report. Now because of how OBIEE works there are individual "parameter selections" or "dashboards" for each report.

Example: Here is the "dashboard" for the Project Work Plan(s) Report



This will open up on a new Tab.

Note that the default parameters are "All".

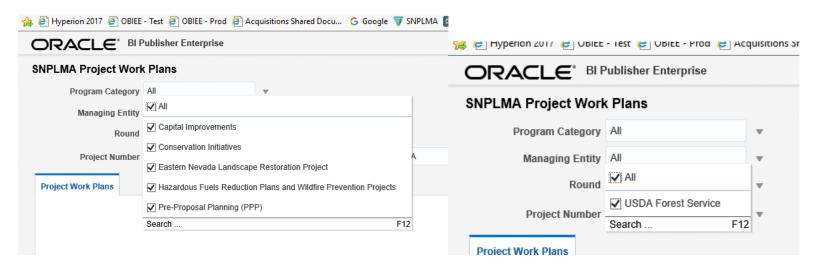
So be sure to make your parameter selections before running anything.

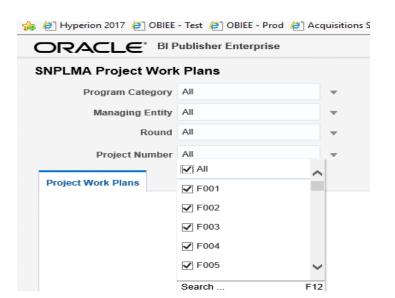
You also can see your login name displayed on the dashboard.



This is so that the application knows who you are and therefore knows what you can see and run reports for.

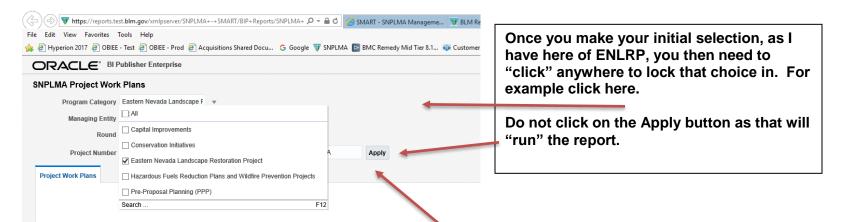
The drop-downs for parameters will only display what you are programmed to view/see projects for.





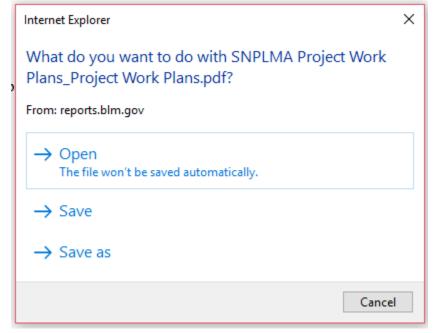
Note you can easily see the list of all your projects and not just the "Active" projects making easier to run reports for any project regardless of the status.

Making your selections is a little tricky now.



Once you have made all of your selections click on Apply

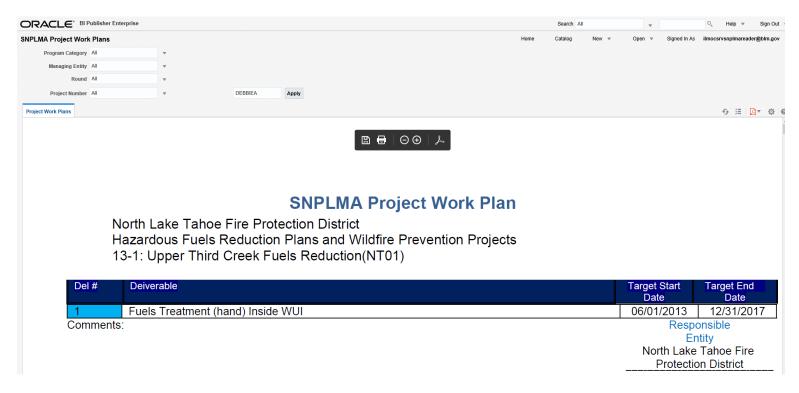
You will see the following dialog box:



Clicking on Save will save a PDF to your Download folder and you will have to go there and open the report and print from the Application you use for PDF's. It will save as SNPLMA "The Name of the Report".pdf (SNPLMA Project Work Plans_Project Work Plans.pdf for example).

Clicking on Save as will open a dialog box that will allow you to browse and save where you want to saveit to and allow you to give it a more meaningful name.

Clicking on Open will open the report on the screen:

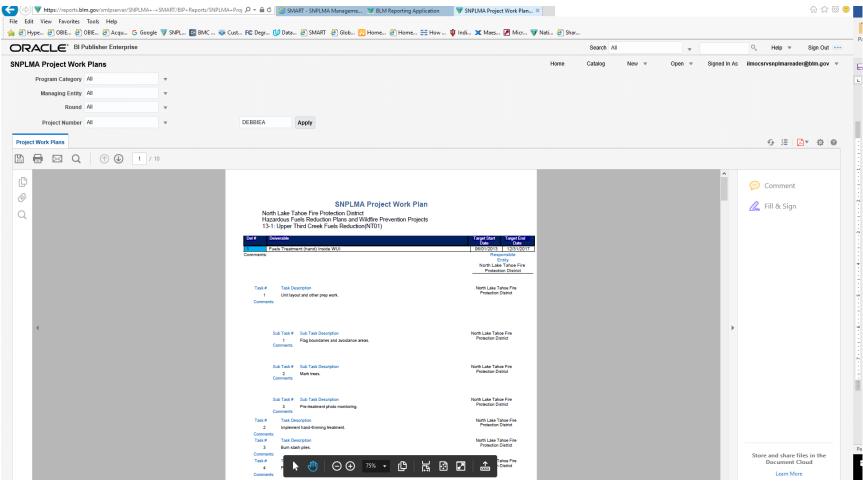


From here you can:

1. physically print the report



- 2. save the report
- 3. size the report so you can see more or less of the report
- 4. use Adobe to do more with it Using Adobe will bring up a "new" screen with more ways to get the report how you want.



You can now see some of the features of your PDF Progam on the screen.



You can even search/find items on the report

You can also take advantage of these additional options of what to do with the report from here:



Clicking on Save will save a PDF to your Download folder and you will have to go there and open the report and print from the Application you use for PDF's. It will save as SNPLMA "The Name of the Report".pdf (SNPLMA Project Work Plans_Project Work Plans.pdf for example).

Clicking on Save as will open a dialog box that will allow you to browse and save where you want to saveit to and allow you to give it a more meaningful name.

SUMMARY

The first step should be completed for all new projects. Steps two through six should be repeated for each project that is not either closed or terminated.

- Problems, issues, and errors should be reported by email to the System Administrator, Deb Ackerman at dackerman@blm.gov. If she cannot resolve the help request, she will submit a remedy ticket to the NOC.
- Requests to reset BASS passwords should be sent to Deb Ackerman at <u>dackerman@blm.gov</u> with the Subject Line "Reset BASS Password." Your user logon ID needs to be included in the body of the email.
- For questions on this manual or other "how to" questions, you may email Deb Ackerman at dackerman@blm.gov or call her at 702-515-5130.
- As always, you may contact your Program Manager for assistance with your status entries.